

# Tuition Reimbursement Application (for Seminars, Conferences, Conventions)

(Form ER75-D, 05/2005)

Training & Development Services  
Department of Employee Relations  
Room 706, City Hall  
Milwaukee WI 53202-3554  
Phone: 414.286.3650 / Fax: 414.286.0800  
Email: jkamme@milwaukee.gov

DO NOT use a pencil to complete the application.

## Section 1 - Applicant Information

<b>NAME:</b>		(WORK): Full-Time <input type="checkbox"/> Part-Time <input type="checkbox"/>
<b>Home Mailing Address:</b>		Zip Code: 532
<b>Department &amp; Division/Section:</b>		PeopleSoft 6-digit I.D. #:
<b>Email Address:</b>	<input type="checkbox"/> Email the Approval Determination Letter to my City (work) email address. <input type="checkbox"/> Email the Approval Determination Letter to my personal email address provided below:	

## Section 2 - Seminar / Conference / Convention Information

Please indicate (in the column below) whether each Seminar, Conference or Convention is related to your current position ("C") or to a promotional opportunity ("P") within City government. PLACE A CHECK MARK IN THE COLUMN BELOW IF YOU ATTENDED ON CITY TIME (*not on your own time*).

SEMINAR / CONFERENCE / CONVENTION TITLE	CITY TIME	"C" or "P"	START DATE (mo/day/year)	END DATE (mo/day/year)	COST
1)	<input type="checkbox"/>				\$
2)	<input type="checkbox"/>				\$
3)	<input type="checkbox"/>				\$

## Section 3 - Attendance Justification

**TOTAL: \$**

Explain how the Seminar, Conference or Convention relates to your current position or to a reasonable promotional opportunity within City government.

## Section 4 - Applicant Signature

If you attended on "City Time" and not on your own time, please sign and FORWARD the completed application DIRECTLY to your Department/Agency Head for approval and signature.

- I have read the instructions and administrative guidelines and I agree to abide by them.
- I understand my Department/Agency Head and Employee Relations must approve this application.

<b>PLEASE SIGN HERE:</b>		<b>Date:</b>
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## DEPARTMENT/AGENCY HEAD SIGNATURE AND APPROVAL

- The courses are directly related to the applicant's present position or to a reasonable promotional opportunity within City government. Courses indicated taken "on City Time" are approved to be on City Time.

<b>Dept/Agency Head Signature →</b>		<b>Date:</b>
<b>Supervisor's Initials (optional)→</b>		<b>Date:</b>

**This section is for Employee Relations' use only. Please DO NOT write in the section below.**

_____	Approved	<b>Tuition</b>	<b>Textbooks</b>	<b>TOTAL</b>
_____	Not Approved	1)		\$
<b>Previous Reimbursement:</b> \$		2)		\$
		3)		\$
<b>Pay Code: 904</b> <b>Pay Date:</b>	<b>COMMENTS:</b>			<b>Total Reimb.: \$</b>

## **REIMBURSEMENT INSTRUCTIONS for:** **Seminars, Conferences and Conventions**

Please use this application (ER-75-D) to apply for reimbursement of **seminars, conferences, conventions**, that are **less** than three weeks in length.

1. If you attend a course that is **at least** 3 weeks or more in length, you need to complete version ER-75 and not this application.
2. If you are applying for Membership Dues reimbursement, please use version ER75-B.
3. Please read the Administrative Guidelines on Page 3.
4. Complete Sections 1-4 of the application.
5. Attach a copy of a PAID receipt that shows the seminar, conference or convention fee has been paid, as well as the amount paid. Please do not submit originals, as they will not be returned to you.
6. If you are taking courses on "City time" and not on your own time, please forward the completed application, along with all necessary documentation **directly** to your Department/Agency Head for approval and signature. Please note that **not** all bargaining units are eligible to take courses on "City Time."
7. If you are taking the courses or seminars on your own time, please mail or fax (286-0800) the completed application, along with the necessary documentation directly to Training & Development Services, Room 706, City Hall.
8. In general, you will receive the reimbursement within 8 weeks from the date Training & Development Services receives the completed application and necessary documentation. **Prior** to receiving the reimbursement, you will receive an Approval Determination Letter. This letter will have let you know on which paycheck the reimbursement will be added.

### **NOTE on receipts:**

Whenever possible, copy all receipts onto one piece of paper (8½" x 11") separate from the application. Please see the Administrative Guidelines for more details on receipts.

## **TUITION BENEFIT ADMINISTRATIVE GUIDELINES**

- **"On City-Time" Use of Tuition Benefit:** Some unions and employee groups are eligible to take CRITICAL, JOB-RELATED COURSES on City-Time. Your Department/Agency Head and Employee Relations must approve courses. ALL other courses, seminars and conferences must be taken on the employee's own time. Please call 286-3387 with any questions. NOTE: ***Not all bargaining units are eligible to use the Tuition Benefit for "on City-time" courses.***
- **Part-Time Employees:** Part-Time employees are eligible for prorated Tuition Benefit provided they work a minimum of 40 hours per pay period.
- **A valid, paid receipt is required** for ALL course, seminar, convention and, conference reimbursement requests.
- **Definition of an Acceptable Receipt:** Receipts MUST show that payment was made, as well as the amount paid. Examples of acceptable receipts include: cash register receipt, canceled check (copy of both sides required), money orders, credit card statements, or official receipts provided by the school or organization. Bank statements are only acceptable when accompanied by a copy of the front of the check or check carbon.
- **Unacceptable receipts include** invoices or registration forms requesting payment, receipts that show payment was made by another person, or receipts that are not legible.
- **Approval Determinations for Courses:** If you want to know in advance if a course will be approved for reimbursement, please call 286-3650 or 286-3387. Courses must be taken at accredited institutions, schools or organizations approved by Employee Relations. The reimbursement is based on courses taken during the calendar year (January - December) and is **always** applied to the year in which a course begins.
- **Grade Reports and Completion Statements:** For college courses, the minimum grade accepted as satisfactory completion is a final grade that represents the minimum grade point average required for a degree, diploma or certificate. "Mid-Term" grade reports are NOT acceptable. Conferences, conventions and seminars DO NOT require a grade report or completion statement.
- **Tuition Reimbursement Benefits Do Not Cover:** Non-required textbooks, union dues, finance charges, sales tax, licenses, certifications, examinations, shipping/handling charges, late and administrative fees, travel expenses (IE: lodging, meals, mileage), parking fees, magazine/journal/ periodical subscriptions, equipment or supplies. Certain bargaining units are eligible for REQUIRED equipment and supply reimbursement.
- **Seasonal Layoff and Unpaid Leaves of Absence:** If you have started a course prior to going on seasonal layoff or an unpaid leave of absence, you will receive your reimbursement check when you return to work. You must still send in the application, receipts and completion statements within eight weeks of the end of the course. However, if you start a course while on an unpaid, involuntary Leave of Absence or Layoff, you are not eligible to receive reimbursement.
- **Taxes:** ALL courses, seminars and conferences, and membership dues are nontaxable. The reimbursement is added to your gross total, but not to taxable earnings and NO withholdings will be taken.
- **Resignations from City Employment:** If you resign from City employment within six months of receiving a Tuition Benefit, that amount will be withheld from your final paycheck. This does not apply to those who retire, transfer to the School Board, or whose positions are eliminated due to budget cuts. You will not receive reimbursement for a class if you leave prior to completing it.